

Chapter Overview

Introduction

The objective of this chapter is to provide concise, user friendly job aids for entering and updating general personnel data, such as information on dependency, insurance, identification cards, and other miscellaneous items not covered in other sections of this manual.

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Section Overview

Introduction This section will guide you through the process of electing, increasing, reducing, declining, or canceling SGLI coverage and reporting casualties.

In this section

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BAH/Dependency/Emergency Data (CG-4170A)

Purpose The BAH/Dependency/Emergency Data Validation (CG-4170A) is an official document required by law for the use pertaining to:

- Person(s) to notify in case of emergency or death
- Name of person(s) receiving death gratuities
- Person(s) who receive allotment of pay if missing or unable to transmit funds
- Person(s) who receive unpaid pay and allowances
- Record dependents as defined in the Coast Guard Pay Manual, COMDTINST M7220.29 (Series) to determine dependency for BAH entitlement purposes
- Verify (on an annual basis) that dependents, on who BAH is being paid, continue to be related to and supported by the member.

Other uses for the CG-4170A The CG-4170A may be used as partial supporting documentation as long as the individual claimed as a dependent remains a dependent.

Here are some examples of when the CG-4170A may be used as partial supporting documentation:

- Payment of family separation allowance and/or family separation - housing
 - Payment of station allowances at the with dependents rate
 - Payment of dislocation allowance at the with dependents rate
 - When applying for dependent ID cards and DEERS privileges
-

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BAH/Dependency/Emergency Data (CG-4170A), Continued

Cases not to use the CG-4170A Do not use the CG-4170A to designate a beneficiary or change amount of coverage for:

- National Service Life Insurance
 - Servicemembers' Group Life Insurance (use VA Form SGLV-8286)
 - Government Life Insurance
-

When to submit the CG-4170A The CG-4170A will be submitted by all active duty and reserve members and cadets upon:

- Initial entry into the Coast Guard or Coast Guard Reserve
- Reenlistment after a break in service
- Change in status from enlisted to officer or officer to enlisted
- Recall to active duty of retired members
- Reporting to a new Permanent Duty Station
- Anytime a member acquires an initial or additional dependents
- When any material change occurs in dependency status.
(Separation, divorce, death of dependent, dependent entering the Armed Forces, voluntarily withdrawing dependency claim, etc.)

Note: When removing any dependent from the CG-4170A that originally required HRSIC approval of the dependent, a copy of the new CG-4170A must be forwarded to HRSIC (LGL).

- Changes to the form occurring in any item
-

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Section A
DECEDENT AFFAIRS

BAH/Dependency/Emergency Data (CG-4170A), Continued

Overview of the Item by item description.
CG-4170A

Item	Description	
1	The member's Social Security Number.	
2	The member's last name, first name, and middle initial.	
3	The member's rate or rank.	
4	The member's current duty station.	
5	Unit ID number (DD-OPFAC).	
6	Servicing PERSRU's OPFAC number and name.	
7	The member's date of birth.	
8	The member's marital status and spouse relationship code.	
	Code	Meaning
	1	Married and spouse not in service.
	2	Married and spouse is on active duty.
	3	Marriage is in an interlocutory status. Spouse is not on active duty.
	4	Marriage is in an interlocutory status. Spouse is on active duty.
	5	Member is legally separated from spouse. Spouse is not on active duty.
	6	Member is legally separated from spouse. Spouse is on active duty.
	7	Married and spouse in reserve component. (Drilling and IRR).
	A	Member's most recent marriage ended in annulment.
	D	Member's most recent marriage ended in divorce.
	S	Member has never been married.
	W	Member's most recent marriage ended due to death of spouse.

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BAH/Dependency/Emergency Data (CG-4170A), Continued

Overview of the
CG-4170A
(continued)

Item	Description
9	Date of marriage.
10	City or County, State and Country of member's marriage.
11	Spouse's branch of service (if applicable).
12-21	<ul style="list-style-type: none">• Spouse information - Name, address, phone numbers, BAH status, date of birth, dependency date and whether or not to notify in case of emergency.• Children information - Name, address, phone numbers, BAH status, date of birth, dependency date of all children (regardless of age) including those from former marriages, adopted children, wards, stepchildren or illegitimate children and whether or not to notify in case of emergency.• Parent information - Name, address, phone numbers, BAH status, dependency date, of the member's adult Next of Kin or close friend not named above, and whether or not to notify in case of emergency.• Minors receiving support information - Name, address, phone numbers, BAH status and dependency date, of any person other than spouse or children under 21 who is receiving 50% or more of their support from the member, and whether or not to notify in case of emergency.
22	HRSIC approval of dependents for BAH (if required).

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Section A
DECEDENT AFFAIRS

BAH/Dependency/Emergency Data (CG-4170A), Continued

**Overview of the
CG-4170A
(continued)**

Item	Description
24	The name, relationship, address, and phone number of the beneficiary(ies) member desires to receive the 6-month death gratuity in the event they are not survived by a spouse or children. Parents/brothers/sisters only.
25	The name, relationship, address, and phone numbers of the beneficiary(ies) member desires to receive any unpaid pay and allowances due at the time of death, and the % paid to the beneficiary.
26	The name, relationship, address, and phone numbers of the person to receive allotment of pay if member is missing or unable to transmit funds. Also the % of pay that is to be sent monthly.
27	Full name of any insurance company, address, and policy number(s).
28	Remarks and space for annual certification as discussed in Stage 1, on page 5-C-2.
29-31	If correct, member signs in item 29. <ul style="list-style-type: none">• If incorrect, have member make changes on the CG-4170A data sheet and return to PERSRU for corrections. The signature will be witnessed in item 30. Date the form in item 31, the date signed.
Distribution	Return signed data sheet to PERSRU. Keep a copy for Unit PDR, if maintained.

Servicemembers' Group Life Insurance (SGLI)

Introduction	Servicemembers' Group Life Insurance was established for the purpose of making life insurance protection available to members of the Uniformed Services at a reasonable cost. This information will assist the member when electing, increasing, reducing, declining or canceling coverage.
Reference	<ul style="list-style-type: none">• CG Personnel Manual, Article 18-D-4 and 18-D-5, Servicemembers' Group Life Insurance (SGLI) and Veterans' Group Life Insurance (VGLI)• VA Handbook 29-75-1 (Revised April 1994), Servicemembers' and Veterans' Group Life Insurance Handbook
Automatic coverage	<p>SGLI will automatically insure all newly accessed members for \$250,000 and allow them to either:</p> <ul style="list-style-type: none">• decline coverage of SGLI, or• elect a reduced level of coverage of SGLI in multiples of \$10,000. <p>Note: SGLI coverage continues (at no cost to the member) for a period of 120 days following separation or release from active duty, unless the member becomes a drilling reservist upon release from active duty.</p>

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Servicemembers' Group Life Insurance (SGLI), Continued

**Coverage for
reserve
members,
continued**

The following reserves have full-time coverage under SGLI (unless the reservist declines coverage in writing):

- Reservists on active duty or active duty for training.
- Reservists on inactive duty training.
- Reservists assigned to the selected reserve who are assigned to a unit or position in which the reservist may be required to perform active duty, or active duty for training, and each year will be scheduled to perform at least twelve periods of inactive duty training that is creditable for retirement purposes.

The following reserve members do not have coverage under SGLI, but may elect coverage under Veterans' Group Life Insurance (VGLI):

- Reservists in the individual ready reserve (IRR).
- Reservists in the retired reserve (RET-1, RET-2, or RET-3 status).
- Reservists who were covered by SGLI who separate from active duty, active duty for training, or the selected reserve.

Requests for coverage under VGLI must be made within 120 days of entry into one of the above three statuses, and enrollment must be effected through the Office of Servicemembers' Group Life Insurance. Contact:

OFFICE OF SERVICEMEMBERS' GROUP LIFE INSURANCE
213 WASHINGTON STREET
NEWARK NJ 07102-2999
Phone: 1-800-419-1473

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Servicemembers' Group Life Insurance (SGLI), Continued

**Payment of
SGLI premium**

Premium payments for active duty personnel and reservists eligible to receive drill pay will be through automatic payroll deduction and reflected on the member's LES.

Note: Reservists enrolled in SGLI who do not drill temporarily, but remain in a good pay status, will accrue a negative SGLI premium. Upon resumption of a drilling status, the system will deduct the negative premium balance from the member's pay. If the member does not drill for pay within five months and no SGLI payments is made SGLI coverage will be administratively terminated.

For payment by check or money order, remit payment to "U.S. Coast Guard" and forward to:

COMMANDING OFFICER (DC)
USCG HUMAN RESOURCES
SERVICE & INFORMATION CENTER
ATTN: SGLI
444 SE QUINCY STREET
TOPEKA KS 66683-3591

**Payment of
SGLI premium,
continued**

Ensure payment is clearly marked "SGLI PAYMENT" and includes the following information:

- member's name
- member's EMPLID

For payment by credit card (Visa or Master Card) call HRSIC (DC) at (785) 339-3610.

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Servicemembers' Group Life Insurance (SGLI), Continued

**Procedures for
electing
coverage or
increased
coverage
previously
declined or
decreased**

If a member previously elected to cancel SGLI, reduce SGLI, or not be insured of SGLI at all, and later wants to obtain or increase existing SGLI coverage, the member must make a written request. Application must be made on the Request for Insurance (SGLV-8285), in accordance with instructions contained on the back of the form.

The form SGLV-8285 should be completed and signed by the member in the presence of an authorized representative of his/her command, who should then complete the certification below the member's signature.

Use the following table to determine if approval by the Office of Servicemembers' Group Life Insurance (OSGLI) is required before coverage can be increased or restored:

If	Then
Member answers "NO" to item 11, and all parts of items 12 and 13	Member meets the "proof of good health" requirement. SGLI can be increased or restored. The original and photocopies of the completed form are distributed as follows: Original - CGPC (adm-3) Photocopy 1 - PERSRU Photocopy 2 - Member Photocopy 3 - Unit PDR (optional)
Member answers "YES" to item 11 or any part of item 12 or 13	The original SGLV-8285 is filed in the member's personnel file and a copy of the completed form is sent to the OSGLI for review and approval. SGLI may not be increased or restored until approval has been received from OSGLI.
Approval has been obtained by OSGLI on the member	The copy returned from OSGLI is filed with the original SGLV-8286 at CGPC (adm-3). Photocopies of the "Approval" are distributed as follows: Photocopy 1 - PERSRU Photocopy 2 - Member Photocopy 3 - Unit PDR (optional)

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Servicemembers' Group Life Insurance (SGLI), Continued

**Procedures for
reducing or
declining
coverage**

A member who desires a reduced amount or declines coverage must complete a Servicemembers' Group Life Insurance Election and Certificate (SGLV-8286). Reduction or cancellation will be effective at midnight of the last day of the month in which an SGLI transaction (P809) is processed by HRSIC.

**Servicemembers'
Group Life
Insurance
Election and
Certificate
(SGLV-8286)**

Members who have SGLI coverage must complete the Servicemembers' Group Life Insurance Election and Certificate (SGLV-8286) whenever he/she makes a beneficiary designation or changes a previous designation. The Service members' and Veterans' Group Life Insurance Handbook (VA Handbook 29-75-1) should be available for the member to read when completing this form. The SGLV-8286 should be available at most admin offices and/or may be downloaded from the web at the following site: <http://www.insurance.va.gov/forms/8286.pdf>. The following are guidelines to be used in the preparation and distribution of the SGLV-8286 Form:

**Instructions for
completing the
SGLV-8286**

Instructions for completing the SGLV-8286 are on page 3 of the form. The member must read the instructions before attempting to complete the form.

**When a
member should
designate a
specific
beneficiary(ies)**

Members should be encouraged to name a specific beneficiary. Use of "By Law" designation should be discouraged. There are many instances when the member should clearly designate a specific beneficiary(ies) such as:

- When a member has a parent who has remarried but both natural parents are living; or
- When a member is divorced and remarried, but has children living with the first spouse; or
- When a member has no immediate next of kin and wants a distant relative or friend to receive the proceeds.

**Designating
Principal
Beneficiary(ies)
on the SGLV-
8286**

The Primary Beneficiary should be a primary individual or individuals designated to receive insurance proceeds.

When designating multiple principal beneficiaries - the member should specify in percentile the shares to be paid to each; otherwise, they will share equally in the proceeds. The total amount of proceeds must be equal to 100% (i.e., spouse 75% and child 25%).

Continued on Next Page

Servicemembers' Group Life Insurance (SGLI), Continued

Servicemembers' Group Life Insurance Election and Certificate (SGLV-8286), continued	Designating Contingent Beneficiaries on the SGLV-8286	<p>The contingent Beneficiary is a secondary individual or individuals designated to receive insurance proceeds in the event that the principal beneficiary is no longer living.</p> <p>When designating multiple contingent beneficiaries, the member should specify in percentile the shares to be paid to each; otherwise, they will share equally in the proceeds. As with the Principal Beneficiaries, when designating multiple contingent beneficiaries, the total amount of proceeds must be equal to 100% (i.e., father 50% and sister 50%).</p>
	Designations of beneficiaries who are minors	<p>Notwithstanding the provisions of any other law, payment of SGLI may be made directly to a surviving spouse who is a minor on his or her own behalf, and payment in such case shall be complete quittance to the insurer.</p> <p>When a member wishes to name minors as beneficiaries (such as his or her own children, nephews, nieces, etc.), the member should be advised that the proceeds of the insurance cannot be paid to a minor beneficiary, other than a minor surviving spouse, without a court-appointed guardian. The appointment of a guardian is often time consuming and costly and, for that reason, may delay the payment of the proceeds. The amount of the proceeds can be greatly reduced by the payment of court costs, attorney fees and expenses incurred by the guardian. One way to avoid such complication and expense is to designate a pre-appointed trustee of the minor beneficiary. Otherwise, members who insist on designating minors as SGLI beneficiaries should be referred to legal counsel (such as legal support attorney) for advice on establishment of a trust.</p>

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Servicemembers' Group Life Insurance (SGLI), Continued

Servicemembers' Group Life Insurance Election and Certificate (SGLV-8286), continued

If member does not designate a Beneficiary(ies)

If a member does not designate a beneficiary, the insurance will automatically be paid in the following order of precedence:

- The surviving spouse of the member, if none,
- The child or children of the member, in equal shares, with the share of any deceased child to be distributed among the descendants of that child; if none,
- The parents in equal shares or all to a surviving parent; if none,

Note: A member's biological parents are not always who the insured intended to receive the proceeds, and in cases such as abandonment, they are not recognized as legal parents. Claim disputes involving the recognition of "rightful" parents can be avoided by discouraging the use of "By Law" designations and listing parents by name.

- A duly appointed executor or administrator of the insured's estate; if none,
- Other next of kin

When a member is likely to be survived by dependents or parents and designates some other person or entity as beneficiary, a responsible representative should counsel the member to the fact that the Servicemembers' Group Life Insurance Act was specifically designed to provide some form of security for dependents or parents. The member should be encouraged to designate such dependents or parents as beneficiaries.

Note: Under no circumstances should a member be compelled to designate any beneficiary. Designation is a matter of free election for the insured, and the insured should never be forced to designate otherwise. However, when dependents or parents are disregarded in designating beneficiaries, it is desirable that the voluntary nature of the designation should be a matter of record.

A witness must be present when SGLV-8286 is completed by the member

An authorized representative of the U. S. Coast Guard (i.e., CO, XO, OINC, XPO, Yeoman, etc.) must witness the member's signature at the time of preparation in the appropriate blocks. The date the form is received and witnessed should be accurately recorded as it determines the reduction or cancellation date of the insurance, and is the basis for establishing payroll deductions or authorizing collections in a reduced amount.

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Servicemembers' Group Life Insurance (SGLI), Continued

Servicemembers' Group Life Insurance Election and Certificate (SGLV-8286), continued

Common errors on the SGLV-8286

Common errors that are made to the SGLV-8286 Form:

- The member does not sign the form.
- When the form is completed by the member, there is no witness or witness signature.
- The form is not being filed in the member's unit PDR and PERSRU PDR.
- Members are designating minors as principal or contingent beneficiaries (unless the minor is legally emancipated, they can't receive the payment).
- The sum total of either the primary or contingent beneficiaries does not equal 100%.
- By law designations. Most DOD services have specific policies prohibiting this election, which can result in delays in payment, or the member not completely understanding how the funds will be distributed.

Process and Distribution of SGLV-8286

The following table describes the responsibilities associated with the SGLV-8286 and the distribution of the form:

Stage	Who does it	What Happens
1	Member	Completes Form SGLV-8286 per instructions on the form
2	Witness	Signs the witness block at same time member signs the form.
3	Unit	Photocopies are made of the original form and distributed as follows: Original - CGPC (adm-3) Photocopy 1 - PERSRU Photocopy 2 - Member Photocopy 3 - Unit PDR (optional) Note: The distribution printed on the SGLV-8286 itself should be disregarded.
4	PERSRU	Enters SGLI information in CGHRMS. Note: If SGLI was administratively terminated due to the arrears of premiums, the PERSRU shall not restart SGLI until delinquent premiums have been paid and Form SGLV-8286 has been completed per page 5-A-9 of this section.

SGLI Family Member Coverage

Introduction	<p>The Veterans' Survival Benefits Improvement Act of 2001 extends life insurance coverage to spouses and children of members insured under the Servicemembers' Group Life Insurance (SGLI) program. The section offers background information and procedural guidance for implementing SGLI Family Member Coverage.</p>
Eligibility	<p>Family coverage will be available for the spouses and children of Active duty service members and members of the Ready Reserve of a uniformed service.</p> <p>Ready Reserve members, who have had their SGLI coverage terminated due to non-payment, must have their accounts up-to-date before SGLI can be restarted or Family Member SGLI can be started. See page 5-A-9 of this manual for payment procedures and termination policy.</p> <p>Family coverage is available only in the SGLI program, not in the Veterans' Group Insurance (VGLI) program.</p> <p>Any dependent child under the age 18 is automatically covered under family insurance regardless of their health. Each dependent child of every active duty service member or reservist who is insured under SGLI is automatically insured. Children between the ages of 18 and 23 who are full-time students are covered and any child who, before the age of 18, has been declared legally incompetent will be eligible for family coverage.</p>
Effective Date	<p>Coverage is effective as follows:</p> <ul style="list-style-type: none">• Spousal coverage begins on the date of marriage to the service member.• Natural children are covered beginning on their date of birth.• Coverage for other dependent children of the service member begins on the date when the child becomes a dependent of the member.

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SGLI Family Member Coverage, Continued

**Coverage
Amounts**

The maximum amount of coverage available for spouses is \$100,000. In cases where the member's SGLI coverage is less than \$100,000, the maximum spousal coverage will equal the member's coverage amount.

A member may elect to insure his or her spouse for amounts less than \$100,000, in increments of \$10,000.

If both members are in the military and participate in SGLI, they can both be covered under SGLI and spousal coverage provided that both have SGLI coverage. Each can be insured under both basic SGLI and SGLI family coverage for the maximum amount of \$250,000 and \$100,000, respectively.

All children will be covered for \$10,000.

**Cost of
Coverage**

There is no additional charge for child coverage.

Refer to the table below to determine the monthly premium for spousal coverage.

Amount of Insurance	Age of Spouse				
	34 & below	35-44	45-49	50-54	55 & over
\$100,000	\$9.00	\$13.00	\$20.00	\$32.00	\$55.00
\$ 90,000	\$8.10	\$11.70	\$18.00	\$28.80	\$49.50
\$ 80,000	\$7.20	\$10.40	\$16.00	\$25.60	\$44.00
\$ 70,000	\$6.30	\$ 9.10	\$14.00	\$22.40	\$38.50
\$ 60,000	\$5.40	\$ 7.80	\$12.00	\$19.20	\$33.00
\$ 50,000	\$4.50	\$ 6.50	\$10.00	\$16.00	\$27.50
\$ 40,000	\$3.60	\$ 5.20	\$ 8.00	\$12.80	\$22.00
\$ 30,000	\$2.70	\$ 3.90	\$ 6.00	\$ 9.60	\$16.50
\$ 20,000	\$1.80	\$ 2.60	\$ 4.00	\$ 6.40	\$11.00
\$ 10,000	\$0.90	\$ 1.30	\$ 2.00	\$ 3.20	\$ 5.50

**Deduction of
Premiums**

Premiums for spouse coverage will automatically be deducted from the member's pay beginning with the pay period following the date a family election is recorded in CGHRMS.

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SGLI Family Member Coverage, Continued

Form for Reducing or Declining Coverage

If the member does not want insurance coverage for his/her spouse or wants a reduced amount of coverage, he/she must complete form SGLV-8286A, Family Coverage Election, and submit the completed form to the PERSRU.

The forms can be obtained from the VA's or HRSIC's web sites:

- <http://www.insurance.va.gov/forms/8286A.pdf>.
- <http://www.uscg.mil/hq/hrsic/MSWordForms.htm>

Members may also reduce or decline coverage for their spouse at any later date. When a member cancels spousal coverage, the coverage remains in effect, at no cost to the member, for 120 days after the cancellation date.

Reinstating/ Increasing Family Coverage

Members who have declined or reduced Family Member SGLI coverage can later apply for or increase coverage by completing a form SGLV-8285A and providing proof of insurability (proof of good health).

Spousal Notification

Units must notify the member's spouse, by letter, when the member declines SGLI or Family Member SGLI coverage. This is to inform the spouse that they have 120-days from the date the coverage is terminated to convert Family Member SGLI to commercial coverage. A recommended format for the spousal notification letter follows. A copy of the letter, the unit has sent to the spouse, should accompany any SGLV-8286/8286A forms sent to the PERSRU from members declining coverage.

An example of the spousal notification letter is on the following page.

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U.S. Department
of Transportation

United States
Coast Guard



COMMANDING OFFICER
USCG NAME OF UNIT
(HEADER DOUBLE-CLICK TO EDIT)

123 Any Street
CITY, ST 99999-0000
Staff Symbol: (xxx)
Phone: 123-123-1234
Fax: 123-123-1234

1741
DD Month YEAR

FirstName LastName
Street Address
City, ST Zip

Dear (Mr. Mrs.) (Salutation may be omitted)

We are writing to inform you of Servicemembers' Group Life Insurance (SGLI) or Family SGLI (spouse) coverage changes made by your active duty or reserve member spouse. The purpose of this letter is to notify you of the cancellation of [or impending termination of] your coverage so you may exercise the 120-day conversion benefit. When a member cancels spousal coverage, the coverage remains in effect, at no cost to the member, for 120 days after the cancellation date

You have 120-days from (*enter date of member's election*) to exercise this conversion benefit.

During this 120-day period you can convert this coverage to a policy with a commercial insurance company. Upon request, the Office of Servicemembers' Group of Life Insurance (OSGLI) will provide you with conversion information and a list of participating companies. You can get more information at the VA insurance website at www.insurance.va.gov, or by calling OSGLI at (800) 419-1473. You may also request this information by e-mail to OSGLI.OSGLI@PRUDENTIAL.COM, or writing to:

Office of Servicemembers' Group Life Insurance
213 Washington Avenue
Newark, New Jersey 07102-2999

The block checked below indicates what action your spouse has taken in declining coverage.

Your spouse elected to:

☐ Decline his/her SGLI life insurance. When a member declines SGLI for self or family coverage, coverage for the spouse is terminated.

☐ Decline his/her SGLI Family (spouse) Coverage

Sincerely,

F. M. LAST
Rank/Rate
U. S. Coast Guard
Commanding Officer/By direction of the Command Officer

Casualty Reporting

Introduction	This information is provided to direct you through the process of casualty reporting.
Reference	CG Personnel Manual, Section 11-A, Casualties
Reporting procedures	<p>Reporting procedures are covered in the Personnel Manual along with the disposition of personal effects.</p> <p>Examples of the following are contained in Enclosure (7) of this manual.</p> <ul style="list-style-type: none">• personnel casualty report message• next of kin notification• Commanding Officer's letter to the next of kin• letter request for death determination
Inventory and Disposition of Personal Effects	<p>In cases where a member dies or is missing, complete a CG-3853 (Personal Effects Inventory and Disposition) in accordance with Section 11-A of the Coast Guard Personnel Manual, COMDTINST M1000.6 (series). Distribute the form as follows:</p> <p>Original and two copies: To the officer designated by the Commanding Officer to assume custody of the effects.</p> <ul style="list-style-type: none">• Officer retains original• One copy is to be packed with personal effects.• Second copy is sent to next of kin (If personal effects are shipped to next of kin. Otherwise, second copy goes to Supply Center, Baltimore. IAW Art. 11-A-11.b (3) PERSMAN <p>Copy: Unit PDR</p> <p>Copy: COMDT (G-WPM) (if deceased, captured, missing or incapacitated) PERSCOM ((epm), for enlisted/(opm) for officers) if absent at time of sailing, AWOL, AOL, or deserter.</p> <p>Copy: Unit File</p>

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Casualty Reporting, Continued

**Disposition of
Military
Personnel Data
Records
(PDRs)**

The unit shall forward Unit and Medical PDRs to the servicing PERSRU within two days of:

- Declaring member a deserter
- Member's death

The servicing PERSRU shall forward Unit, Medical, and PERSRU PDRs to Commander (adm-3), Coast Guard Personnel Command within 5 days of the date of death or date member was declared a deserter.

Note: Complete instructions for PDR maintenance and disposition can be found in COMDTINST 1080.10 (series), Military Personnel Data Records (PDR) System, which is reprinted as Appendix (D) to this manual.

Section Overview

Introduction This section will guide you through the procedures required for members with dependents. It will assist you in reporting dependency changes, enrolling in the TRICARE Dental Plan, and issuing dependent ID cards.

In this section

Topic	See Page
Dependency Information	5-B-2
TRICARE Dental Plan	5-B-4
Applying for a Uniformed Service Identification and Privilege Card (DD Form 1173)	5-B-8
Verification of Eligibility for the DD Form 1173	5-B-10
Reserve Family Member Identification Card (DD Form 1173-1)	5-B-12
Information concerning the Application For Uniformed Services Identification Card-DEERS Enrollment (DD Form 1172)	5-B-15
Defense Enrollment Eligibility Reporting System (DEERS)	5-B-17

Dependency Information

Introduction	<p>In order to avoid overpayment, underpayment and to determine eligibility for benefits and privileges administered by the uniformed services, members must notify their units/PERSRUs immediately upon a change in dependency status.</p>
References	<ul style="list-style-type: none">• CG Pay Manual, Basic Allowance for Housing (BAH), Members with Dependents• DOD Instruction 1000.13(series), Identification Cards for Members of the Uniformed Services, Their Dependents, and Other Eligible Individuals. <p>Note: DODINST 1000.13 is reprinted as Appendix (b) to this manual.</p>
Responsibility	<p>The member has responsibility for reporting dependency status changes. Complete a Dependency Worksheet (CG HRSIC-2020) (see enclosure (1) of this manual for blank form) if a member:</p> <ul style="list-style-type: none">• Gets Married, Separated or Divorced• Has an incapacitated child who turns 18 <p>Note: If the member is approaching retirement, forward supporting documentation regardless of the age of the child</p> <ul style="list-style-type: none">• Gains or loses a dependent (e.g., after a dependent dies, marries or divorces and reverts to dependent status)• Has a questionable case of dependency
Final divorce decree not available	<p>To avoid overpayment, members with no other dependents who are awaiting a copy of a final divorce decree should request payment of BAH, OHA and/or COLA at the with dependents rates be stopped effective the date the divorce will become final. The divorce decree must be provided when it becomes available.</p>
Systems that need to be updated	<p>When a member reports a change in dependency, the information is recorded in the PMIS/JUMPS system, for pay purposes, and in the Defense Eligibility Enrollment System (DEERS), to record eligibility for benefits and privileges.</p>

Continued on Next Page

Section B
DEPENDENT AFFAIRS

Dependency Information, Continued

Annual Verification

Annually, during the month of November, members must verify their dependency data on form CG-4170A. Refer to Section 5-C of this manual for procedures on the annual verification.

Note: Redetermination of unique dependency status cases conducted by HRSIC (LGL) will be conducted only during the annual verification of the CG-4170A.

Forms

This table shows the forms that may be needed when a member has a change in dependency. To determine when to use a form and the procedures for completing the form, consult the reference.

Form	Purpose	Reference
Application For Uniformed Service Identification Card- DEERS Enrollment (DD-1172)	Determine entitlement to ID cards, medical care, exchange, theater, and commissary privileges. Update DEERS database	PPPM 5-B-15 and APPEN (B)
BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A)	Update PMIS/JUMPS, determine eligibility for payment of BAH with dependents, casualty reporting, list next of kin and designate beneficiaries	PPPM 5-A-2
Dependency Worksheet (CG HRSIC-2020)	Provide dependency information to PERSRU	PPPM Encl. (1)
DOD Guard and Reserve Family Member ID Card DD-1173-1	Identify dependents of Ready Reserve Members	PPPM 5-B-12 and APPN (B)
Full-Time Student Statement (CG HRSIC-2020B)	Supporting documentation for a member claiming a child over age 21 as a dependent	PPPM Encl. (1)
SGLI Election and Certificate (SGLV-8286)	Elect SGLI amount and designate beneficiaries	PPPM 5-A-7
Support Statement (CG HRSIC-2020A)	Supporting documentation for a member claiming a parent or parent-in-law as a dependent	PPPM Encl. (1)
Uniformed Services Identification and Privilege Card (DD-1173)	Identify individual eligible for dependent benefits and privileges	PPPM 5-B-10 and APPEN (B)

TRICARE Dental Plan

Introduction	The TRICARE Dental Program (TDP) replaced TRICARE dental programs for active duty family members (TFMDP) and Selected Reserve (SELRES) personnel (TSRDP).
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Reference	<ul style="list-style-type: none">• ALPERSRU V/00• ALCOAST 055/01
------------------	--

Discussion	<p>Enrollment in the plan is automatic for members previously enrolled in the Family Member Dental Plan (FMDP). All other active duty members and SELRES and IRR personnel must enroll to participate.</p> <ul style="list-style-type: none">• TDP provides the same dental benefits to all participants.• Premiums will be paid through payroll allotment from the sponsor's pay for family members of active duty personnel. In some cases, it may be direct billing.• Premiums for reservists will be paid by deduction from the member's pay or by direct billing. Premium payments for a reservist's family members will be made by direct billing.
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Eligibility	The TDP is a voluntary, comprehensive dental program offered worldwide by the Department of Defense to family members of all active duty Uniformed Service personnel and to Selected Reserve and Individual Ready Reserve (IRR) members and/or their family members. United Concordia is the administrator of this program.
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TDP premiums	<p>There are two premium rates:</p> <ul style="list-style-type: none">• Single – members with only one dependent or themselves enrolled• Family – members with two or more dependents enrolled.
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Continued on Next Page

TRICARE Dental Plan, Continued

**Automatic
premium
changes**

Premiums will automatically change (if applicable), when dependent:

- Child turns 4 years old, 21 years old and is not enrolled in a full time course of instruction, 23 years old and is a student, or
- Status changes

**Enrollment
requirements**

Enrollment into TDP is subject to the family member(s) being enrolled in DEERS (prior to applying for enrollment in TDP), and the family member(s) must remain enrolled for a minimum of twelve months.

**Enrollment
options**

Enrollment in the TDP may be through a single or family plan. A Selective Reserve or IRR member is eligible to enroll under a single plan for him or herself. Eligible family members are enrolled under a separate single or family plan.

Under the TDP, all eligible family members of a sponsor must be enrolled if any one of them is enrolled with the following exceptions:

- Children under the age of four
- Eligible family members residing in two or more geographically separate locations
- For active duty family member only, and in instances where a family member requires a hospital or special treatment environment (due to medical, physical handicap, or mental condition) for dental care otherwise covered by the TDP, the family member may be excluded from TDP enrollment
- Selected Reserve and IRR sponsors may enroll independently of their family members

Continued on Next Page

TRICARE Dental Plan, Continued

Enrollment period

Regardless of previous enrollment, all new enrollees must remain enrolled in the TDP for at least 12 months. After completing the 12-month minimum enrollment period, enrollment may be continued on a month-to-month basis. Anyone who fails to pay premiums or disenrolls for other than a valid disenrollment reason will be prohibited from re-enrolling in the program for 12 months.

Members who were enrolled under the TRICARE Family Member Dental Plan (TFMDP) or TRICARE Selected Reserve Dental Program (TSRDP) prior to February 1, 2001 are required to complete their original enrollment commitment.

Disenrollment requirement

The member may disenroll dependents(s) from TDP only:

- After the dependent has been enrolled for a period of 12 months.
 - When a sponsor or family(s) member loses DEERS eligibility.
 - If transferred PCS and dependent space available care is available at a Military Medical Treatment Facility. Disenrollment must be accomplished within 90 days of reporting to the new duty station.
 - When an active duty, Selected Reserve or IRR member is transferred to the Standby Reserve or Retired Reserve.
-

Automatic disenrollment

Automatic disenrollment will occur when:

- One member in a joint service marriage leaves the Uniformed Services and has family members assigned to him or her. The family member(s) can be re-enrolled to the other service member without incurring a new 12-month lock-in.
 - The sponsor transfers to the Reserve component.
 - A member of the Reserve component transfers to active duty.
 - Sponsor changes from one branch of service to another.
 - A Selected Reserve or IRR member is called to active duty for greater than 30 days the **member** is disenrolled.
-

Continued on Next Page

TRICARE Dental Plan, Continued

**Effective date
of coverage**

When United Concordia receives an enrollment form, they will confirm eligibility in DEERS and enroll the member(s) in the TDP. If enrollment form is received by the 20th of the month, coverage is effective the first day of the month after the month in which a sponsor enrolls and one month's premium payment is received.

**Evidence of
coverage**

United Concordia will issue evidence of enrollment to all enrollees. In addition, each enrolled member will receive a TDP Identification (ID) Card that should be presented at each dental office visit. Replacement ID cards can be requested by calling United Concordia's Enrollment and Billing Department at 1-888-622-2256.

**New enrollment
in the TDP**

United Concordia handles the enrollment process. Enrollment must be initiated by the sponsor and is accomplished by completing a TDP Enrollment Form. Forms are available by calling United Concordia at 1-888-622-2256 to request a form, by accessing the United Concordia website at www.ucci.com, or from your Health Benefits Advisor. **With the initial enrollment application, all new enrollees must submit a payment equal to the member's portion of one month's premium.**

Applying for a DD Form 1173

Introduction The DD Form 1173 is used to identify individuals eligible for privileges administered by the uniformed services. This will guide you through the application process.

References

- CG Personnel Manual, Section 18-C, Uniformed Service Identification and Privilege Card, DD Form 1173
- DODINST 1000.13, (Appendix (b) to this manual)

How to apply This is the process for applying for a DD Form 1173

When	Then
the member is active duty CG and at the command,	submit a DD Form 1172 to any military installation that issues ID cards.
the active duty member is away from the command,	submit a DD Form 1172 to any military installation that issues ID cards.
the active duty member is on extended deployment outside CONUS	the dependent can renew an expired card at any military installation that issues ID cards.
the active duty member is retiring,	before retiring submit a DD Form 1172 for the dependent(s) to any military installation that issues ID cards.
the active duty members is placed on the Temporary Disability Retirement List,	submit a DD Form 1172 to any military installation that issues ID cards.
the reserve member is retired with pay,	submit a DD Form 1172 for the dependent to any military installation that issues ID cards.
the member is a 100% disabled veteran,	submit a DD Form 1172 for the dependent(s) to any military installation that issues ID cards.
the member is separating and is eligible for Transition Assistance benefits	submit a DD Form 1172 for the member and dependent(s) to the command holding the PDR.

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Applying for a DD Form 1173, Continued

How to apply (continued)

When	Then Submit the following to HRSIC (RAS)
the member is from an armed force of a foreign nation	<ul style="list-style-type: none">• DD Form 1172
the member has a foreign marriage or divorce	<ul style="list-style-type: none">• DD Form 1172• translated copy of foreign marriage certificate/divorce decree
the member has a dependent parent or parent-in-law	<ul style="list-style-type: none">• DD Form 1172• Support Statement, (CG HRSIC 2020A), see Encl. (1)• copy of member's tax return (IRS Form 1040/1040A showing parent claimed as dependent)
member has a child over age 21 incapable of self support	<ul style="list-style-type: none">• DD Form 1172• Support Statement, (CG HRSIC 2020A), see Encl. (1)• medical/psychological statement of incapacitation• Social Security Administration determination concerning Medicare Part A entitlement• copy of member's tax return (IRS Form 1040/1040A showing child claimed as a dependent)
the member has an unremarried or unmarried former spouse AND this is an initial ID card issuance (the former spouse is not enrolled in DEERS)	<ul style="list-style-type: none">• DD Form 1172• Statement for Former Spouse, (CG HRSIC 2020C), see Encl. (1)• certified copies of marriage and divorce decrees

How to complete the DD Form 1172 and DD Form 1173

Detailed instructions on how to complete the DD Form 1172 and DD Form 1173 can be found in Appendix (B) to this manual.

Verification of Eligibility for the DD Form 1173

Introduction This information is provided to aid you in determining the eligibility of a member's past and present dependents for the DD Form 1173.

Reference CG Personnel Manual, Article 18-C-2, Eligibility

Verification of eligibility Any ID card issuing unit can verify eligibility and issue original cards by using DEERS or by presentation of:

- Retirement orders
 - DD-214
 - Marriage, birth, or death certificate
 - VA letter of certification
-

If eligibility cannot be established When eligibility cannot be established through DEERS or by documentation presented then contact these offices;

Coast Guard	COMMANDER (RAS) COAST GUARD HUMAN RESOURCES SERVICE & INFORMATION CENTER 444 SE QUINCY STREET TOPEKA KS 66683-3591 (800) 772-8724/(913) 357-3416 (use area code 785 after 20 Jul. 97)
Air Force	HQ AFCGPC/DPMDOP NORTHEAST OFFICE PLACE 9504 I H 35 NORTH SAN ANTONIO TX 78233-6636 (512) 652-2089
Marine Corps	COMMANDANT OF THE MC CODE: MMSR6 WASHINGTON DC 20380-0001 (703) 614-1031/1038

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Section B
DEPENDENT AFFAIRS

Verification of Eligibility for the DD Form 1173, Continued

**If eligibility
cannot be
established
(continued)**

Army	COMMANDER, TAPC ATTN: TAPC-PDO-IP 200 STOVALL AVE. ALEXANDRIA VA 22332-0474 (707) 325-9590
Navy	COMMANDING OFFICER BUREAU OF PERSONNEL PERS-334 WASHINGTON DC 20370-5334
USPHS	(301) 443-9000
NOAA	(301) 443-8616

**Entitlements on
the DD Form
1173**

Eligibility of the spouse and unmarried children of active duty members may be certified if information on the DD Form 1172 is the same as indicated on the approved BAH/Dependency/Emergency Data and SGLI Validation Form, CG-4170A. Entitlements can be determined by referring to Appendix (B) of this manual.

Reserve Family Member Identification Card

Introduction The Reserve Family Member Identification Card (DD Form 1173-1) was developed for use by all military services. The Coast Guard uses it for identification only. It has no authorization for access to military benefits unless accompanied by a set of valid active duty orders, Commissary Privilege Card, or pay voucher.

How to apply The process for applying for a DD Form 1173-1:

If	Then
the member is from the Selective Reserve,	submit a DD Form 1172 to any unit authorized to issue ID cards
the member is from the Ready Reserve or Retired Reserve,	submit a DD Form 1172 to HRSIC (RAS)

Dependent eligibility A dependent is considered to be a spouse, child, stepchild, or ward.

If	Then the dependent is
the dependent's sponsor is in the Ready Reserve (which includes the Selective Reserve and the Individual Ready Reserve) or Retired Reserve,	eligible.
the dependent is over 21 or under 10, a former spouse, or requires dependency determination,	ineligible.

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Section B
DEPENDENT AFFAIRS

Reserve Family Member Identification Card, Continued

Preparation Commands designated as issuing activities for DD Form 2 CG (Reserve) are designated issuing activities for DD Form 1173-1. Issuing activities may issue DD Form 1173-1 upon receipt of a properly completed and verified DD Form 1172.

Application over 90 days old At the discretion of the commanding officer, a DD Form 1172 verified more than 90 days before presentation to the issuing activity may be considered questionable for issuance of the DD Form 1173-1. Before refusing any person in this situation, the issuing activity should assist the applicant in attempting to contact the officer who verified the DD Form 1172.

Dependent not able to visit issuing office In unusual circumstances where an eligible dependent cannot get to an issuing activity, a notarized statement setting forth sufficient facts to establish identity, a completed DD Form 1173-1, and the reasons for not going to the issuing office may be accepted as a basis for issuing a DD Form 1173-1.

Corrections No DD Form 1173-1 will be issued which contains an erasure, alteration or strikeover. When a change is required on a card in the preparation stage, a new card will be prepared.

Instructions Most entries on the DD Form 1173-1 are self-explanatory;

Item	Input
1	Enter last name, first and middle initial and relationship code of sponsor
2	Enter height in inches. Valid range 00-96
3	Enter weight in pounds
4	Enter eye color

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Section B
DEPENDENT AFFAIRS

Reserve Family Member Identification Card, Continued

Instructions
(continued)

Item	Input
5	Enter hair color
6	Enter SSN (e.g., 000 00 0000)
7	Enter date of birth (YYYYMMDD)
8	Enter a maximum of 4 years from date of verification, the sponsor's expiration of service date or child's 21st birth date, whichever occurs first (YYYYMMDD)
9	Each recipient must sign this block, use (incp) for permanent incapacitation or (inct) for temporary
10a	Enter pay grade and sponsor's name (Last, First, MI)
10b	Enter sponsor's SSN (e.g., 000 00 0000)
10c	Enter organization the sponsor is attached
10d	Enter the correct abbreviation for the sponsor's status from block 4 of DD Form 1172
11	Enter district and number, issuing facility, city state (e.g., CGD14(APRU)HONOLULU, HI)
12	Enter year, month, date issued (YYYYMMDD)
13	Verifying official must sign here

DEERS
enrollment

ID issuing activities should handle DD Form 1172 for the reserve family member ID card in the same manner as those for all other ID cards. In addition, place "X" in the pre-enrollment block in the upper left-hand corner of the form.

Information Concerning the DD Form 1172

Introduction	This information has been provided to guide you through the process of completing a DD Form 1172.
Reference	CG Personnel Manual, Section 18-C, Uniformed Service Identification and Privilege Card.
Preparation of DD Form 1172	Detailed instructions on how to complete the DD Form 1172 can be found in Appendix (B) to this manual.
Section I, sponsor information	This section will be completed by or for the sponsor or applicant. Complete block 9 only when an ID card is issued to the sponsor.
Section II, dependent information	This section will be completed by or for the sponsor. Dependents under age 10 will be listed for DEERS enrollment purposes using the same guidelines for expiration of eligibility as though they were receiving a card. Do not list dependents already enrolled in DEERS every time a DD Form 1172 is submitted. For additional space use another DD Form 1172.
Section III, sponsor declaration and remarks	A DEERS check should be the first source for verification and the only substantiation if the applicant is enrolled. An active duty sponsor's refusal to apply for a DD Form 1172 shall be treated as nonsupport.
Reporting loss or theft of an ID card	<p>The loss or theft of an identification card will be reported by entering the following statement in Section III:</p> <p>"I certify that the identification card previously issued to (insert name of cardholder) was (insert "lost" or "stolen") under the following circumstances (give complete circumstances surrounding loss or theft). If the card is recovered I will surrender it to proper military authority."</p>

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Section B
DEPENDENT AFFAIRS

Information Concerning the DD Form 1172, Continued

Questionable cases If the eligibility of a claimed dependent is questionable, call HRSIC (RAS), 1-800-722-8724, for determination.

Privileges authorized This table describes types of privileges used and abbreviations.

Privilege	Authorized	DD 1172 abbr.
Commissary	Use of the commissary	C
Theater	With unlimited exchange privileges or when sponsor resides in Government Quarters	T
Exchange Unlimited	Unlimited exchange usage and all privileges	EU
Exchange Limited	All exchange privileges except for purchase of uniform and State-tax-free products like alcohol and tobacco	EL
Medical care Uniformed Services	To receive both inpatient and outpatient care at any Uniformed Services medical facility subject to space available	MS
Medical care Civilian	Care, both inpatient and outpatient, from civilian source using CHAMPUS	MC

Defense Enrollment Eligibility Reporting System (DEERS)

Introduction DEERS is a database operated by the Department of Defense that houses data on all military sponsors and dependents to support the benefits system.

Data on sponsors Data on sponsors is provided to DEERS through magnetic tape submission from HRSIC and other uniformed services finance centers. USCG sponsors are enrolled and updated on DEERS when changes in the PMIS database are transmitted to DEERS.

Procedures for transmitting data to DEERS Procedures for updating the DEERS database using electronic on-line systems or floppy diskette applications are provided by the DEERS Support Office (DSO).

- Manual submissions of completed DD Form 1172s are not authorized.
 - ID card issuing activities **that do not have** the capability to update the DEERS database using electronic on-line systems or floppy diskette applications should contact the appropriate district or MLC personnel office for local procedures used to update DEERS.
-

When to update DEERS DEERS must be updated when:

- An ID card is issued.
- A member reports a change in dependency (e.g., birth, divorce) or a change of address that does not involve issuance of an ID card.
- The member's residence address must be updated within 30 days of a residential move such as during PCS or any other exchange in residence. Exceptions to this rule are those circumstances when a member is:
 - a) Permanently assigned overseas.
 - b) Assigned to a vessel.
 - c) Assigned to a routinely deployable unit.
 - d) Assigned to units the Commandant has determined should not be disclosed due to national security or safety concerns.

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Defense Enrollment Eligibility Reporting System (DEERS), Continued

Updating residential address

Member's can update their residential address one of the following ways:

- At any Real time Automated Personnel Identification System (RAPIDS).
 - By calling the DEERS Support office (DSO) listed below.
 - In writing to: DSO, 400 Gigling RD, Seaside, CA 93955-6771.
 - By faxing address change to DSO at: (408) 655-8317.
 - By E-mail to DSO at: addrinfo@osd.pentagon.mil.
 - At any Military Treatment Facility (MTF).
-

DEERS inquiries

Beneficiaries with questions or problems with DEERS enrollment may call the DEERS beneficiary telephone center to verify the information contained in the database.

Note: The beneficiary center can only update residence address information in DEERS over the phone. If information other than the residence address is incorrect, the caller will be instructed to contact their servicing personnel office to have the database updated.

Phone numbers for DEERS beneficiary telephone center

If calling from	Then dial
California	800-334-4162
Alaska or Hawaii	800-527-5602
All other states	800-538-9552

Reports from the DEERS database

Information in the DEERS database can be used to produce enrollment listings, pantograph listings, demographic reports and other type of reports.

Obtaining DEERS database reports

Units may request DEERS database reports from the USCG Liaison at the Defense Manpower Data Center (DMDC).

The phone number for USCG Liaison at DMDC is:
(408)-583-2400 Ext 4346.

Section Overview

Introduction This section provides you with the necessary procedures for annual verification of entitlements, statement of creditable service, security clearances, and information regarding the PDIF and PDE.

In this section

Topic	See Page
Annual Verification of CG-4170A	5-C-2
Requesting Statements of Creditable Service	5-C-3
Personnel Data Information File (PDIF)	5-C-6
Personnel Data Extract (PDE)	5-C-7
Security Clearances	5-C-8
Transcript of Sea Service (TOSS)	5-C-9

Section C
MAINTENANCE OF PERSONNEL INFORMATION

Annual Verification of CG-4170A

Introduction Annually during the month of November, members must verify their dependency data on form CG-4170A.

Reference (a) SDAII User Guide, Pages 2-A-115 through 2-A-121

Verification of the CG-4170A This is how verification of the CG-4170A works:

Stage	Who does it	What Happens	
1	Unit	Using the unit PDR copy, ensure the member verifies the CG-4170A annually in November. <ul style="list-style-type: none">Note 1: Units may use a stamp in block 28 (Remarks) of the CG-4170A to record the member's annual certification, rather than printing a new CG-4170A each year. The stamped entry should read: "ITEMS 9 THROUGH 28 CERTIFIED CORRECT" With spaces for the member's signature and date signed.Note 2: Servicemember's Group Life Insurance Data no longer appears on the CG-4170A and has no annual verification requirements.	
2	Member	If	Then
		All information is correct	Signs in block 28, or in block 29 if space is available, and returns the CG-4170A to unit
3	Unit	Changes or corrections are needed	Makes pen and ink changes to form, and if necessary: <ul style="list-style-type: none">Completes a Dependency Information Worksheet (encl. (1) to this manual) if adding a BAH eligible dependent Returns the CG-4170A to unit
		If	Then
4	PERSRU	All information is correct and member has signed original	<ul style="list-style-type: none">Forward original to PERSRUForward copy to CGPC (adm-3)File copy in Unit PDR (optional)
		Corrections are needed	Forwards the changes to the PERSRU.
4	PERSRU	If	Then
		No changes were noted by member	Files copy of verified CG-4170A in PERSRU PDR
		Changes were noted by member	Completes a new CG-4170A and forwards to unit for member's signature.
4	PERSRU	Member with dependents fails to verify CG-4170A by 30 November	Change BAH with dependents entitlement to BAH without effective 30 November IAW reference (a). If CG-4170A is later verified, restart BAH with dependents entitlement effective the date the CG-4170A is verified.

Requesting Statements of Creditable Service

Introduction	This will assist you in requesting a Statement of Creditable Service (SOCS) and/or a Statement of Creditable Sea Service (SOCSS).
Procedure for requesting Statements of Creditable Service	<p>This is the procedure for requesting statements of creditable service/sea service on a USCG/USCGR member with a Pay Base Date (PBD), Active Duty Base Date (ADBD) and/or creditable sea pay time problem. You should request a SOCS/SOCSS for the following members who meet these criteria:</p> <ul style="list-style-type: none">• Newly assigned (PCS) USCG/USCGR member with prior service that has not been verified;• Newly accessed member into the USCG/USCGR with any prior military service;• Any reserve member entering Extended Active Duty for more than 139 days must have request for a SOCS submitted for ADBD verification regardless of the fact that a SOCS may have been previously completed. <p>Note: Do not ignore suspected sea time errors just because a member is not currently assigned to a sea pay eligible vessel. Take immediate action. A recent change to advancement criteria makes sea time a factor for advancement. Sea time can also have an impact on PCS assignments.</p>

Continued on Next Page

Requesting Statements of Creditable Service, Continued

**Procedure for
requesting
Statements of
Creditable
Service,
Continued**

How to process a Statement of Creditable Service/Sea Service, continued:

Stage	Who does it	What happens
1	UNIT	<p>Reviews the member's PDR and any supporting documents the member has, notes the specific period of service/sea service the member is disputing and forwards to the PERSRU.</p> <ul style="list-style-type: none"> Members can help the process by providing any documents they have that substantiate prior service, such as a DD Form 214, any reserve point statements, orders, or a Navy Statement of Service. If a member requests career sea service validation for the purpose of Merchant Marine licensing, be aware that the document required by the Merchant Marines is a Transcript of Sea Service (TOSS) (HRSIC 1075). Do not confuse this with a SOCSS, because the TOSS will include periods of service aboard vessels not eligible for sea pay/time (see 5-C-8 of this section for requirements on requesting TOSS).
2	PERSRU	<p>Reviews the PMIS database (item #6 'SOCS-DT' on any PMIS/JUMPS Inquiry Screen) to verify whether or not a SOCS has already been completed.</p> <ul style="list-style-type: none"> If a SOCS has not been completed, and it can be verified that the member is not receiving credit for a specific period of <i>prior</i> service/sea service, request a SOCS/SOCSS from HRSIC (SES) by Memorandum (Memo) and attach all supporting documentation. The Memo request needs to contain the member's full name, EMPLID, service branch, and period of service. <p>VERY IMPORTANT: If there is a DD-214 or other documents supporting creditable service and/or sea service, and the member's pay base date, active duty base date or sea pay longevity is incorrect, the member can request an immediate adjustment.</p> <p><u>The request must be sent to HRSIC (SES) and must indicate: "The member has been counseled and understands that if the pay base date, active duty base date or total sea time, based on the DD-214, is not supported by the prior service records, the member may be in an overpaid status".</u></p>

Continued on Next Page

Requesting Statements of Creditable Service, Continued


**Procedure for
requesting
Statements of
Creditable
Service,
Continued**

How to process a Statement of Creditable Service/Sea Service, continued:

Stage	Who does it	What happens
2	PERSRU Continued	Note: Please ensure that periods of Coast Guard sea service or ADT that are in dispute are processed via the PERSRU transmittal. There is no need to request a SOCS/SOCSS in these instances because the transmitted documents will result in the member's JUMPS account being adjusted correctly.
3	HRSIC	<p>Is responsible to verify and validate all periods of prior service (all branches) and sea service to adjust a member's Pay Base Date (PBD), Active Duty Base Date (ADB) or cumulative sea service time.</p> <ul style="list-style-type: none"> With supporting documentation by the PERSRU, makes interim adjustment to member's service dates and/or sea service time. <u>The member must provide a statement indicating that the interim adjustment may put him/her in an overpaid status (as discussed in stage 2 on previous page).</u> Request records from Headquarters or from the appropriate record center (if applicable). This process is the lengthiest. Verifies dates. Issues member a SOCS (HRSIC Form 1071) and/or a SOCSS (HRSIC Form 1072). Makes necessary adjustments to member's pay account. <p>Note: Completing the process can take from 3 to 6 months, depending on how quick the other Service responds to the request. The most difficult part of this process is retrieving the necessary information needed from the other Services. Please allow 90 days for processing of SOCS/SOCSS requests by HRSIC before submitting any follow-up or tracer requests.</p>
4	PERSRU	<p>Once the SOCS/SOCSS has been forwarded to the PERSRU, ensure a copy is retained in the PERSRU PDR, and forward a copy to the unit requesting verification.</p> <p>Note: If the original SOCS/SOCSS is found to be in error, because of an incorrect date or missing period of service/sea service, please forward the original SOCS/SOCSS with all documentation to HRSIC (SES) by rapidraft, with the periods in dispute clearly addressed.</p>
5	UNIT	<p>After HRSIC completes the SOCS/SOCSS and the PERSRU forwards the package to the unit, the member should be made aware of the impact the SOCS/SOCSS will have on his/her PBD, ADB, or cumulative sea service. Member should also be aware that a credit or debit to his pay would probably occur due to the change in his/her PBD, ADB, or cumulative sea service.</p> <p>Note: Unit should ensure member understands and agrees with SOCS/SOCSS and then notify PERSRU by deadline date contained in the letter.</p>

Personnel Data Information File (PDIF)

Introduction The Personnel Data Information File (PDIF) is a summary of personnel data from the HRSIC Personnel Data Record (PDR). The HRSIC PDR is an electronic record of personnel and pay data on the member.

When will units receive a PDIF  Units can expect a PDIF to be provided by the PERSRU at the following times:

- Within 5 working days after a member reports in PCS
- Quarterly in January, April, July and October
- Upon the request of the unit

Note: If you are not receiving the PDIFs for all of the members assigned to your unit, contact the PERSRU and ask them why you are not receiving them.

PERSRU to Unit Transmission The PERSRU has the ability to send PDIFs to the unit via E-mail or by printed copy via regular mail. Units should inform their PERSRU which method is preferred.

Block by block description Explanation of the information on the PDIF is contained in Enclosure (5) of this manual.

Personnel Data Extract (PDE)

Introduction The Personnel Data Extract (PDE), CG-4902, is periodically produced by PMIS/JUMMPS and provides important personnel database information.

The PDE The PDE is provided to give the member a description of all the items in the database concerning the next servicewide exam cycle or warrant officer appointment cycle. It is issued prior to each active and reserve exam cycle.

Upon receipt Follow these rules upon receipt of a PDE.

If	Then
no errors are found,	member signs and returns to unit
errors are found or suspected,	forward to the PERSRU with necessary supporting documents

Note: Responsibility for verification of PDE information rests solely with the member through the assistance of the command.

Security Clearances

Introduction	This has been provided to help you locate the policies and procedures for maintaining personnel security clearance information.
Reference	Military Personnel Security Program Manual, COMDTINST M5520.12A, Chapter 2, Administrative Procedures.
Personnel Security Record	When the Central Adjudication Facility (CAF) makes a favorable security determination, notification is made via CGHRMS updates and by a certificate of clearance known as the source document. This source document shall have a properly executed SF-312 and CG-5588 attached and is filed in the member's PDR.
Preparation and Maintenance of Security Documents	Policies and procedures governing the preparation and maintenance of security documents can be found in the Military Security Program Manual, COMDTINST M5520.12A.

Transcript of Sea Service (TOSS)

Introduction

A Transcript of Sea Service (TOSS (CG HRSIC-1075)) is used to document service on board Coast Guard vessels for the purpose of obtaining a Merchant Marine License. The Transcript of Sea Service lists information regarding a member's sea service, including:

- Names of vessels
- Shaft Horsepower
- Dates the member served on each vessel
- Rank at time of departure from each vessel

Note: This document does not serve to verify creditable sea service for pay purposes (refer to 5-C-3 of this section).

How to obtain a Transcript of Sea Service

If a member desires that a Transcript of Sea Service be prepared, the following must occur:

Stage	Who does it	Action to be taken
1	PERSRU	Request TOSS (CG HRSIC 1075) via Memorandum or E-mail and forward to HRSIC (SES). Note: The request should include the date the member entered the service and a summary of vessels he/she served on.
2	HRSIC (SES)	Issues CG HRSIC-1075 within 30 days of the date HRSIC received the request. The original and a copy are mailed to the PERSRU.
3	PERSRU	Forwards the original TOSS to the member and files the copy in PERSRU PDR.

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Section Overview

Introduction This section provides you with the information needed to understand and perform miscellaneous personnel transactions that are not covered in any other section of this manual.

In this section

Topic	See Page
Leave Authorization (CG-2519)	5-D-2
Leave Carried over in Excess of 60 Days	5-D-4
Preparation of the DD Form 2 CG (active ID card) and DD Form 2 (retired ID card)	5-D-6
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Leave Authorization (CG-2519)

Reference	CG Personnel Manual, Section 7-A, Leave
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CG-2519 usage	<p>The Leave Authorization (CG-2519) is used to authorize:</p> <ul style="list-style-type: none">• Regular, sick or emergency leave <p>Note: The CG-2519 is only required for sick leave in excess of 2 days.</p> <ul style="list-style-type: none">• Compensatory absence in connection with leave
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Do NOT use the CG-2519 for Compensatory Absence in conjunction with TDY/PCS orders	<p>The Leave Authorization (CG-2519) must not be used for compensatory absence (CA) in the following instances:</p> <ul style="list-style-type: none">• Periods of CA which are associated with PCS• Periods of CA in conjunction with TDY orders• CA, unless such absence is granted consecutively with leave
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Continued on Next Page

Section D
MISCELLANEOUS

Leave Authorization (CG-2519), Continued

**Preparation of
the CG-2519**

The CG-2519 can be typed, prepared using Forms Menu, or handwritten.

Items 1-7 are completed prior to departing.

The space below item 8 is used to indicate if the member used more than one type of absence. Only units outside CONUS need to list regular leave outside CONUS (AO) and regular leave inside CONUS (AI). List types and inclusive date in chronological order.

Follow these procedures for completing the CG-2519.

Item	Description
1	Enter the member's last name, first and middle initials.
2	Enter rate/rank of the member.
3	Enter member's SSN.
4	Enter the unit where the member is assigned.
5	Enter the complete address and phone number.
6	Enter the number of days of authorized absence.
7	DEPARTURE: Enter the time and date absence begins. Note: This entry would normally be the time and date normal liberty begins (a day of duty) and the day before the actual first day of leave/absence.
	RETURN: Enter the time and date the absence expires. Note: This entry would normally be the time and date the member is expected to be back at the work site/unit (a day of duty) and is the first day after the last day of leave/absence.
	AUTHORIZED OFFICIAL: Sign and date.
8	CHANGE ENDORSEMENT Pen and ink changes to item 7 are NOT allowed. Enter leave date and times if different from those authorized.

Disposition

Forward parts 1 and 2 to the PERSRU upon member's return from leave. If part 2 was given to the member (e.g., for AMC flight) forward only part 1.

Leave Carried over in Excess of 60 Days

Introduction

Members may be authorized to carry more than sixty (60) days leave into a new fiscal year, if the provisions of Article 7.A.15 of the PERSMAN are met.

Reference

Personnel Manual, COMDTINT M1000.6 (series), Article 7.A.15

Procedures for carrying over of more than 60 days for a member

If a member believes that he/she is qualified to carry over more than 60 days of leave into a fiscal year, then the following steps must occur:

Step	Who does it	Action taken
1	MEMBER	Must submit a letter via the chain of command to HRSIC (MAS) and the letter must contain: <ul style="list-style-type: none">• a description of the reason the member was prevented from using leave.• an estimate of the total number of days to be carried into the new fiscal year.
2	UNIT	Endorse the letter and send to HRSIC (MAS) NLT 1 November.
3	HRSIC (MAS)	Will screen all requests for compliance with Article 7.A.15. Cases falling under Article 7.A.15.d will be forwarded to COMDT (G-WPM-1) for determination.
4	COMDT (G-WPM-1)	Will review all forwarded requests. When review is complete will return both approved and disapproved requests to HRSIC (MAS) for action.
5	HRSIC (MAS)	Return all disapproved requests to the member via the chain of command. Will accumulate all other requests and will process them immediately following the December end-of-month compute. Note: This timing ensures that any outstanding leave is posted prior to manual adjustments being made.

The member must submit a new request if he/she becomes qualified again for additional days to be carried over.

Continued on Next Page

Leave Carried over in Excess of 60 Days, Continued

Procedures for carrying over of more than 60 days for multiple members at a unit

If multiple members of a unit are qualified to carry over more than 60 days of leave into a fiscal year, then the unit must:

Step	Who does it	Action taken
1	UNIT	Must submit a letter, E-mail, or message to HRSIC (MAS) and the letter must contain: <ul style="list-style-type: none">• a description of the qualifying circumstances• a listing of each member believed entitled, including Name and full SSN• an estimate of the total number of days to be carried into the new fiscal year for each member
2	HRSIC (MAS)	Will screen all requests for compliance with Article 7.A.15. Cases falling under Article 7.A.15.d will be forwarded to COMDT (G-WPM-1) for determination.
3	COMDT (G-WPM-1)	Will review all forwarded requests. When review is complete will return both approved and disapproved requests to HRSIC (MAS) for action.
4	HRSIC (MAS)	Return all disapproved requests to unit. Will accumulate all other requests and process them immediately following the December end-of-month compute. Note: This timing ensures that any outstanding leave is posted prior to manual adjustments being made.

The unit must submit a new request if a multiple number of members assigned to the unit become qualified again for additional days to be carried over.

Members have 3 years to use carried over leave

Members have 3 years to use any excess leave carried forward. Any such leave will automatically be carried forward until used, or until the three-year “window” has closed. The carry-over balance will not be reduced until all of the regular leave accrued for the year has been used. For example:

A member is authorized to carry forward 65.0 days on 1 October 1996 (5 days out of the 65 days is excess leave carried forward). During fiscal year 1997 this member uses 32 days leave and accrues 30 days leave. This reduces the member’s excess leave carry forward balance from the prior year to 3.0 days (the 2.0 days over 30.0 coming off the carry over). On 1 October 1997, PMIS/JUMPS will automatically carry 63.0 days forward (30 days accrued for fiscal year 1997 **plus** 33 days carried over from the prior year **equals** 63 days), since the 3 year window is still open.

Preparation of the DD Form 2 CG and DD Form 2

Introduction

Armed Forces Identification Card DD Form 2 CG and DD Form 2 are used as a means of identifying members on active duty, in the reserve, or in a military retired status. The card will be prepared using data contained on the DD Form 1172.

Use of “RAPIDS” facilities is mandatory for ID Card issuance

On 1 November 1996 the issuance of ID Cards through the Real-Time Automated Personnel identification Card System (RAPIDS) became mandatory. Manual preparation of ID cards is prohibited except in the following circumstances:

- Afloat units may issue DD Form 2 (Active) on a case-by-case basis, when underway and a RAPIDS facility is not available.
 - Transition Assistance Management Program (TAMP) beneficiaries and foreign students may be issued DD Form 1173.
 - HRSIC (RAS) may issue DD Form 1173-1.
-

Availability of RAPIDS facilities

The seven uniformed services have signed a cross-servicing agreement to provide ID card support to all eligible beneficiaries, regardless of their parent service. Once an ID card issuing facility is designated a RAPIDS site, service will be available to any eligible beneficiary.

RAPIDS sites have been established within reasonable distances of most units. Most Coast Guard District, ISC, and Group Offices are designated RAPIDS sites. Most large Department of Defense commands, active and reserve, are designated RAPIDS sites.

Coast Guard units unable to determine their supporting RAPIDS site should contact COMDT (G-WPM-2) for assistance.

Reference

CG Personnel Manual, Section 13-E, Identification Cards and Tags.

Continued on Next Page

Preparation of the DD Form 2 CG and DD Form 2, Continued

Preparation

Prepare the DD Form 2 CG (Active), DD Form 2 CG (Reserve) and DD Form 2 using a typewriter or the RAPIDS computer equipment. All dates will be in YYYYMMDD format. Most entries on the card are self-explanatory, there are a few exceptions:

Block	Description
Grade	<ul style="list-style-type: none">• For pay grades E-1 to E-3, enter NON PETTY OFFICER.• For pay grades E-4, E-5 or E-6, enter PO3 (E-4), PO2 (E-5), or PO1 (E-6).• For pay grades E-7, E-8 or E-9, enter CPO (E-7), SCPO (E-8), or MCPO (E-9).• For pay grades CWO2 to CWO4 enter CWO (W-2), (W-3), (W-4), as appropriate.• For pay grades O-1 to O-10, enter ENS (O-1), LTJG (O-2), as appropriate.• For Cadets enter CDT. <p>Note: Reserve members retired without pay - enter the abbreviation “RET” after member’s grade on DD Form 2 CG (Reserve).</p>
Expiration Date	<ul style="list-style-type: none">• Active duty enlisted, enter expiration of enlistment.• Cadets, enter expected date of graduation.• Reservist on active duty, enter expiration of active duty.• Reserve enlisted, enter expiration of reserve enlistment.• Reserve member retired without pay, enter 60th birthday.• Officers, enter INDEFINITE.• All Retired members, enter INDEFINITE.• TDRL, see appendix B page 3-2-1.
Signature	Type the full name below the line, member signs in black or blue ink above typed name.

Continued on Next Page

Preparation of the DD Form 2 CG and DD Form 2, Continued

Preparation (continued)

Block	Description
Social Security No.	Enter 9 digit SSN in format 000000000.
Blood Type	Enter the member's blood type (e.g., B-, O+).
Geneva Convention	See Appendix B, Pg. 5-4 of this manual and enter I, II, etc. as appropriate
Date of Issue	Enter the date of signature by the issuing officer.
Signature of Issuing Officer	Manual ID cards Only enter first name or initial, middle initial, last name, rate/rank, and branch of military service. Signature must be in black or blue ink.
Medical for DD Form 2 (Retired)	See page 16 of Appendix (B) to this manual (paragraph 3.a.(3)).

Photograph (for manually prepared ID cards only)

The size of the photo should be approximately 1 inch by 1 inch. The portrait will have the member's full face and consist of the largest image that will include the member's head and information on a title board before a neutral background. The portrait can be black and white or color. The member will be uncovered. An information board is required for members on active duty who are issued a manually prepared ID card. The information board will contain the following information about the member, each on a separate line below each other.

- Last name
 - First name and middle initial
 - Social security number
-

Lamination

Use only polyester, polyethylene coated plastic film, preferably .010 mil. in thickness and thermoplastic laminating equipment.

Section D
MISCELLANEOUS

Personal Clothing and Equipment Record (AF Form 538)

Introduction The purpose of the Personal Clothing and Equipment Record is to record protective clothing and equipment that has been issued to personnel.

Usage Unit COs must ensure that all members under their command who have been issued equipment have an up-to-date AF Form 538. It must be used to record:

- Issue date
 - Inspection dates
 - Modifications and repairs
-

Preparation The individual responsible for issuing, monitoring, and accounting for issued items should maintain the form.

Block	Description
National Stock Number and Article	Enter the national stock number (NSN) on the top half of the block and the description of the article on the lower half.
Authorized Allowance	<u>ASC</u> Enter the quantity of the item authorized for issue as listed in COMDTINST M10470.10.
	<u>QNTY</u> Enter the actual quantity of the article issued.
Size	Enter the size of the article.
Issue Date	Enter the date the article was issued. For returnable items enter an R in the number block and an N for non-returnable.
Turn in Date	Enter the date the article was turned in for repairs, modification, or due to transfer. Enter an R in the numbered block corresponding to the turn in date of the article. For non-returnable items, enter NONRETURNABLE across the numbered block.
Balance on Hand	Leave blank.

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Section D
MISCELLANEOUS

Personal Clothing and Equipment Record (AF Form 538),

Continued

Preparation

(continued)

Block	Description
1 thru 19	Enter the articles following the above instructions
20	Leave blank
21	Leave blank
22	Enter present unit
23	Enter the grade/rate or the member
24	Enter member's SSN
25	Enter the member's work phone number
26	Enter the member's last name, first name, and MI
Signature of Individual	Have the member sign in the block which corresponds to the article(s) issue date
Signature of Sup Rep	Have the supply representative sign in the block which corresponds to the article(s) turned in
Page	Enter the consecutive page number
27	Date and signature will be entered by the individual performing the inventory
28	Leave blank
Validation	Leave blank
Remarks	Use for any explanatory information

Reporting Change in Mailing Address

Introduction

A member's mailing address is shown in block 22 of their LES. This address should be the member's home address and not the unit address. The member's mailing address is used for several purposes, including mailing IRS Form W-2 annually for all personnel, and LESs for reservists as well as members assigned to detached OPFACs.

This table describes how to change your home mailing address using the new CGHRMS process. Instructions may also be accessed at the following web site address: <http://cghrms.osc.uscg.mil>.

Members without access to CGHRMS

If you do not have access to CGHRMS, contact your servicing PERSRU for instructions.

Step	Action
1	Select menu items in this order: Home > Self Service > Employee > Tasks > Home and Home Mailing Address
2	Enter your mailing address in the ADDRESS 1 field. <u>Do not</u> use fields 2 or 3. Note: The home address can be any address you want to enter. The mailing address is where you W-2 form and all correspondence will be mailed.
3	Enter the two-letter state abbreviation code in the STATE field.
4	Choose immediate or enter an effective date for change. If you choose "on this date", enter a future date. You cannot enter a date prior to the date you are entering the information into CGHRMS.
5	Click SAVE after verifying the information you have entered.
6	Click OK on the save confirmation page Note: If you selected a future date for the effective date of change there will be a link at the bottom of the Home and Mailing Address page to view, delete, or edit the change.

Employment Verification

Introduction Requests for employment verification from outside the Coast Guard should be completed at the unit if they have the information requested; if not, forward to the PERSRU.

Reference Privacy and Freedom of Information Act Manual, Enclosure (7).

Procedure All requests for employment verification will be completed as follows:

IF the information is	THEN
not Privacy Act sensitive,	complete the request.
Privacy Act sensitive,	complete the request, attach a signed statement by the member authorizing release of the information and make the appropriate entry on the Disclosure Log.

Electronic Assignment Data Card (E-ADC)

Introduction The E-ADC is necessary to provide up-to-date information to personnel assignment officers regarding a member's personal status and assignment preference.

References

- CG Personnel Manual
 - Articles 4-C.2.a through 4-C-2.f
- Commissioned and Warrant Officer Billet Manual
 - Section A, Officer Billet Code System
 - Section B, Occupational Field Codes
 - Section C, Organizational Level Codes
 - Section D, Job Position Locator Codes
- Enlisted Billet Manual, Chapter 5, Tables of General OPFAC Codes & Geographic Areas.
- On line Self Service Menu - <http://cghrms.osc.uscg.mil/>

Submission of the E-ADC The E-ADC must be submitted by active duty personnel as follows:

- Within 6 months of reporting to a new unit. (No longer required for officers per ALCGOFF 048/00)
- To request a specific duty assignment.
- To request a tour extension at current PDS.
- To request mutual or unilateral transfer.
- 6 to 9 months prior to a member's discharge or RELAD date.
- During the "Engage" phase of the S.P.E.A.R. assignment process, for members who will be tour complete in the upcoming fiscal year.

The E-ADC must be submitted by reserve personnel as follows:

- To request transfer to a new unit.
-

Preparation and distribution All active duty personnel are required to use the automated Assignment Data System. Manual submission of the CG-3698A is no longer authorized. Detailed instructions for the Assignment Data System may be found on line at <http://cghrms.osc.uscg.mil>.

Continued on Next Page

Electronic Assignment Data Card (E-ADC), Continued

The assignment process using the new system

This table describes how the Assignment Data System is used in the assignment process. Instructions may also be accessed at the following web site address: <http://cghrms.osc.uscg.mil>.

Stage	Description
1	<u>Assignment Officer develops slate.</u> Vacant billets are automatically added to the Shopping List.
2	<u>Member views Shopping List.</u> Chooses jobs to be added to the Assignment Data Request.
3	<u>Member completes Assignment Data Request.</u> Providing contact information, communicating assignment concerns, and organizing job picks from Shopping List into a prioritized list.
4	<u>Command reviews Assignment Data Request.</u> Ensuring member is qualified for jobs requested. Assisting member in enrolling in the Coast Guard Special Needs Program if assignment concerns indicate a need to do so. Endorsing Assignment Data Request and entering comments for the Assignment Officer.
5	<u>Assignment Officer makes assignments.</u> Using the system to search for and identify candidates based on Assignment Data Requests and individual qualifications (competencies). When a match is made and processed by the Assignment Officer, the system will notify the member via email, generate a TONO for orders and update the pending arrivals and departures in the Commands' Airport Terminal. Note: For inactive duty reserve personnel the servicing ISC (FOT) makes assignments.
6	<u>Command reviews Airport Terminal.</u> Obtaining a listing of all pending transfers to and from the unit. Working with the PERSRU or Human Resource Service Center to issue PCS orders for departing personnel. Assigning sponsors and sending welcome aboard information to incoming personnel.

Assignment/Termination of Government Quarters

Introduction When a member moves into or out of government quarters, it normally results in a change in BAH entitlements. This job aid will assist you in notifying the PERSRU to avoid over/under payments.

The need for prompt PERSU notification Timely input of pay transactions is critical. This is especially true when a pay transaction has a large dollar impact on the member, such as a transaction connected with government quarters occupancy or termination.

- Providing timely notification (within 48 hours) of a change to a member's housing status will enable the PERSRU to input the required PMIS/JUMPS transactions and ensure the member receives the correct amount of pay.

In any typical month there are over \$40,000 in overpayments to Coast Guard members assigned to government quarters. Although some of the overpayments are caused by normal processing delays (e. g., time between PERSRU input and the time the next PMIS/JUMPS update is run), a large majority can be directly attributed to the unit's or the housing officer's failure to notify the member's PERSRU in a timely fashion.

References CG Housing Manual,
Section 6-E, Assignment to Public Quarters and Rental Housing
Section 6-F, Termination of Assignment: Public Quarters and Rental Housing

Advance notification will avoid incorrect payments Members anticipating assignment to government quarters may submit a special request to the PERSRU to have the BAH stopped ahead of time to avoid being overpaid.

A member desiring to live on the economy must request permission from their commanding officer to be eligible for BAH entitlements.

Continued on Next Page

Assignment/Termination of Government Quarters, Continued

Notifying the PERSRU

PERSRUs, housing offices and unit administrative staffs must work together to develop local procedures for PERSRU notification. Proper documentation is always required. However, PERSRUs may accept, at their discretion, telephone notification of housing status changes, as long it will be followed up with “hard copy” documentation within 48 hours.

In the absence of an agreement between housing officials and the servicing PERSRU, follow these procedures upon notification that a member has been assigned or terminated quarters:

Step	Action
1	Local Housing Officer, Unit administrative staff, or the member notifies the servicing PERSRU within 48 hours by E-mail or most efficient means. <ul style="list-style-type: none">• Provide copy of notification to Area Housing Officer.
2	Ensure notification includes: <ul style="list-style-type: none">• Rate/Rank• Name & SSN• Date of assignment/termination• Indicate if spouse is in service• Indicate type of quarters• If inadequate quarters indicate the rental fee
3	Upon receipt of the notification, the PERSRU will submit the appropriate PMIS/JUMPS transactions

Permissive Travel Authorization

Introduction	A Permissive travel authorization must be prepared in Basic Coast Guard Letter format. Use of the CG-2519, CG-4251, CG-5131, or authenticated message is not authorized.
Reference	CG Personnel Manual, COMDTINST M1000.6 (series), Article 7-A-10
Preparing a Permissive Travel Authorization	<p>A Permissive travel authorization must contain the following:</p> <ul style="list-style-type: none">• Reason for the travel authorization• Location and inclusive date the member will be absent• This non-cost statement from the PERSMAN <p>“This authorization is issued with the understanding that you will not be entitled to reimbursement for mileage or expense in connection therewith. In case you do not desire to bear this expense, consider this authorization cancelled.”</p> <ul style="list-style-type: none">• The member’s signature acknowledging understanding of the non-cost statement
Distribution	The unit must give the original travel authorization to the member. Upon return, the member must endorse the travel authorization with the time/date of departure and return. After return and endorsement by member, the original travel authorization must be forwarded to the PERSRU to complete personnel transactions to credit/debit subsistence entitlements.
Note	Members performing permissive travel for house hunting in the vicinity of their new permanent duty station should consider taking several certified copies of their latest LES.

Corrections/Changes of Names, SSN, Date of Birth, or Minority Designator

Introduction	Changes in official Coast Guard records must be made only after an administrative examination has been made of the documentation presented, and approval is obtained from HRSIC (MAS).
Reference	COMDTINST M1080.10 (series), Military Personnel Records Data (PDR) System
Change of surname due to marriage or divorce	<p>A change of surname due to marriage or divorce must be reported by letter to HRSIC (MAS) and supported by one of the following documents:</p> <ul style="list-style-type: none">• Copy of marriage certificate.• Copy of final divorce decree containing provisions for restoration of maiden name. <p>Note: The letter must be submitted and signed by the member, then endorsed by the command.</p>
Change of name for other reasons or correction of date of birth	<p>A request for change of name for any reason other than marriage or divorce (see above) or a request for correction of date of birth must be submitted to HRSIC (MAS); and supported by whichever of the following documents is applicable:</p> <ul style="list-style-type: none">• Copy of court order authorizing name change• Naturalization certificate authorizing name change• Birth certificate registered before first enlistment, if not available, provide one of the following:<ul style="list-style-type: none">• Original or Photostat copy from Family Bible, notarized• Baptismal certificate• Original or certified copies of school records• Census records• Birth certificate registered subsequent to first enlistment• Corrected birth certificate with supporting evidence• Affidavits from officials of business concerns such as banking houses or insurance companies that the individual has in the past carried on business under the desired name.

Continued on Next Page

Corrections/Changes of Names, SSN, Date of Birth, or Minority Designator, Continued

Effective date of name change	<p>Changes in name are effective on the date of approval by HRSIC (MAS).</p> <ul style="list-style-type: none">• If the request is approved, HRSIC (MAS) will send a copy of the letter of authorization to CGPC (adm-3) and the PERSRU. HRSIC (MAS) will enter changes directly into PMIS/JUMPS, the PERSRU will make pen & ink changes to the member's PDR and other official documents.
Change of SSN	<p>A change of the social security number in the official records will be made only when authorized by HRSIC (MAS). A request for a change will be forwarded to HRSIC (MAS). A Photostat copy of the social security card must be enclosed with the request.</p> <ul style="list-style-type: none">• If the request is approved, HRSIC (MAS) will send a copy of the letter of authorization to CGPC (adm-3) and the PERSRU. HRSIC (MAS) will enter changes directly into PMIS/JUMPS, the PERSRU will make pen & ink changes to the member's PDR and other official documents.
Change to Minority Designator	<p>To change a minority designator, members must submit their request via letter stating the reasons for the change. The letter request should be submitted to HRSIC (MAS) via the commanding officer.</p> <ul style="list-style-type: none">• If the request is approved, HRSIC (MAS) will send a copy of the letter of authorization to CGPC (adm-3) and the PERSRU. HRSIC (MAS) will enter changes directly into PMIS/JUMPS, the PERSRU will make pen & ink changes to the member's PDR and other official documents